eTrade Document Exchange (eTDE) System
Provider User Guide

Adapted from eTDE Application User Guide
Version 1.3

Aug. 2013

Table of Contents

Integrating External Systems with eTDE

The content to be managed by the eTDE system is created externally. In order for eTDE to manage the content, it must be provided to the eTDE system by an external system. External systems will need to be integrated with the eTDE system to allow the electronic content to be exchanged. Content for the eTDE system can be imported and exported using machine-to-machine interfaces with external systems. Such interfaces with the eTDE system do not require a specific platform, but do require that certain standards are met.

eTDE Integration Standards

To facilitate the import and export processes, standardized methods must be implemented to ensure the integrity of the content and to minimize content handling errors. The eTDE system requires that external system interfaces conform to specific standards to maintain the integrity of the overall system. The following standards apply:

Generating PDF Files as PDF Forms

The eTDE System requires that external systems generate PDF files as *PDF Forms*. A *PDF Form* is an open file format that is used to create files containing text, fonts, images, and two- or three-dimensional vector graphics. Data fields can be created manually or programmatically using the ETDE Toolkit. The data fields can then be populated with data using AMS's ETDE Toolkit. External systems can generate multiple PDF files using a common form. The eTDE System has the capability to receive multiple documents that are created using a common *PDF Form*. The eTDE System also has the capability to extract specific data fields from the *PDF Forms* and to store them in a tabular format in a database. A *PDF Form* will maintain the integrity of the appearance of a document being imported/exported while also providing a secure method of transporting and sharing data.

Importing PDF Files into eTDE via Secure File Transfer Protocol (SFTP-SSH)

To import PDF files to the eTDE System, external systems will FTP batches of PDF files to the eTDE FTP Server hosted by USDA AMS on a scheduled basis. This is done using SFTP-SSH to ensure the security of each batch of files being transmitted. Each external system will FTP batches of PDF files to a directory folder on the FTP Server which is specifically designated to that external system and entity. The eTDE System utilizes the Ipswich WS_FTP COTS product. .

Exporting PDF Files from eTDE via Secure File Transfer Protocol (SFTP-SSH)

The eTDE System exports PDF form files on a scheduled basis. The default schedule will be four times a day at 9:00 AM, 12:00 P.M., 3:00 P.M. and 6:00 P.M. (all EST time). The Export process involves a copy of proper PDF files from the eTDE Import directory to the eTDE Export directory, and update of certain metadata fields within the exported PDF form file. Folders of registered entities are access controlled based on security role and/or access rights granted in eTDE.

Creating PDF Forms Using Adobe Acrobat Professional

Creating a PDF Form Using an Existing Document or Creating a PDF Form Using a Custom Solution. External systems will need to create a *PDF Form* for each **document type**. *PDF Form* creation may be performed using Adobe Acrobat Professional, Version 6.0 or later. A *PDF Form* can be created using an existing file as a template or may be customized using AMS's ETDE Toolkit. Neither method will automatically render an "accessible" PDF Form. See Section 4.6 for information on making *PDF Forms* accessible (i.e. Section 508-compliant). Using one or both of these methods, database table fields from an external system can be mapped to *PDF Form* fields using ETDE Toolkit. *PDF Form* fields should be named in accordance with industry-defined standards to simplify the mapping between external system databases (i.e. document providers and end-users). Industry-defined standard data fields can be found in Appendix C.

Note: The eTDE system only utilizes a subset of the industry-defined standard fields that are transmitted with each document (see Appendix B for a list of eTDE-specific fields). This subset is used internally to the eTDE system to uniquely identify documents as well as for managing, querying, and displaying documents via the Graphical User Interface (GUI).

Populating PDF Forms with Data (Create Trade Document). Once a *PDF Form* has been created with properly named fields, data can then be populated from an external system's database to the *PDF Form*. Once the *PDF Form* is populated with external system data, it can be sent (exported) to the eTDE system in a batch file with other *PDF Forms* via Secure File Transfer Protocol (SFTP). The eTDE system will also have the capability to export batch files to the FTP server at scheduled intervals so that external systems can retrieve *PDF Forms* and/or *PDF Form* fields.

Reading a PDF Form and Writing Data to a Database: The eTDE system will retrieve batch files from the FTP server at scheduled intervals and will import the *PDF Form* and *PDF Form* fields from external systems. Similarly to eTDE, external systems can import *PDF Forms* and *PDF Form* fields. *PDF Form* fields from the eTDE system can be mapped to database table fields of an external system. *PDF Form* fields from the eTDE system will be passed on exactly as they were originally provided by the source system. The *PDF Form* fields should be named in accordance with industry-defined standards to simplify the mapping between *PDF Forms* from the eTDE system and external system databases.

Getting Started with Adobe Acrobat 3D (Adobe Acrobat 7 Professional)

Getting started with Adobe Acrobat 3D

Adobe Acrobat 3D utilizes the same Acrobat version as Adobe Acrobat 7 Professional only there is added functionality for 3D vector graphics. **Adobe Acrobat 6 Professional and later versions have the capability to create** *PDF Forms.*
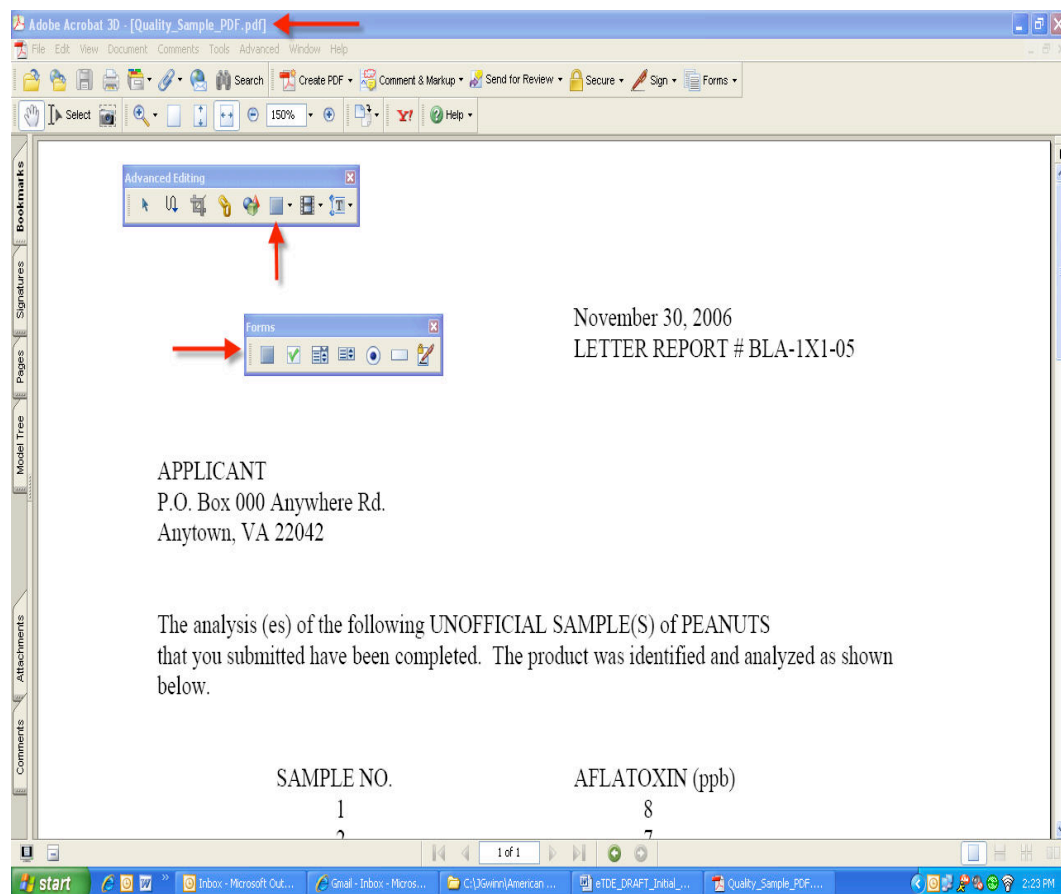
Creating a *PDF Form* Using an Existing PDF File
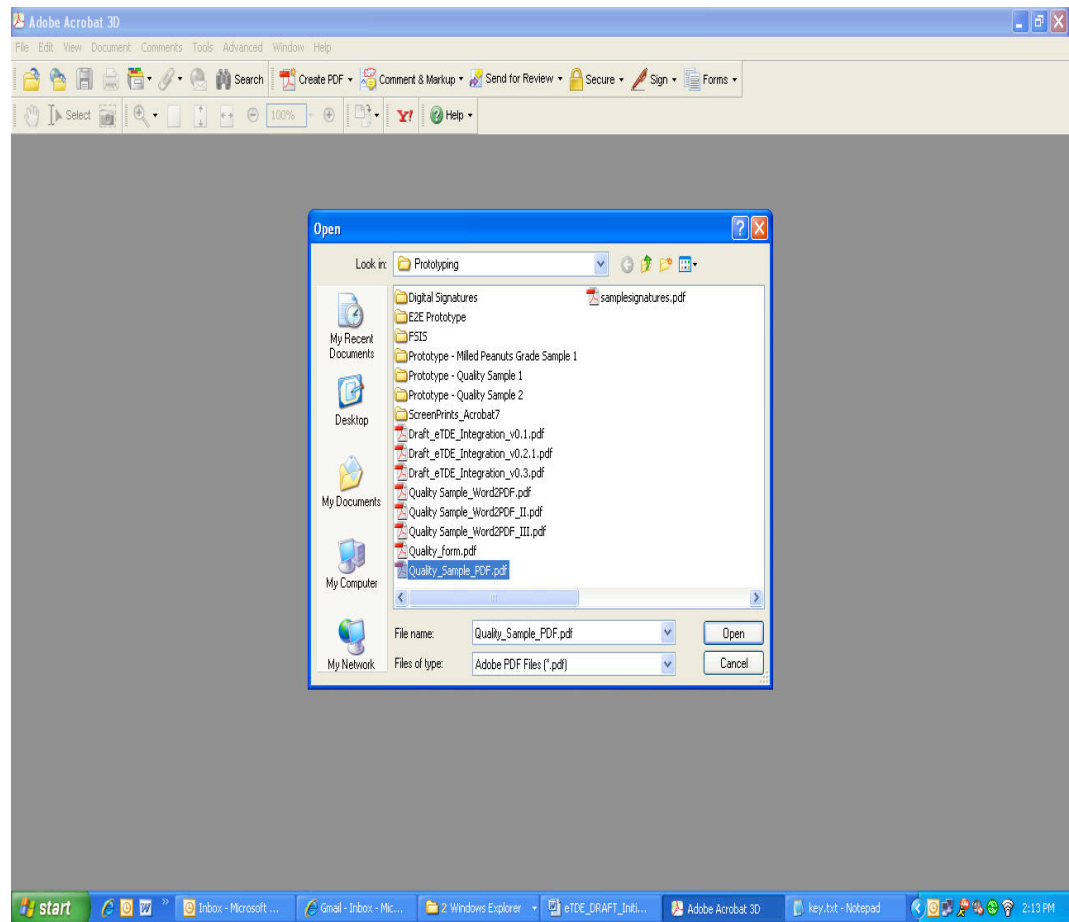
Create a PDF Form using an existing document (File → Open)

A *PDF Form* can be created using an existing electronic document as a template. Open an existing PDF file to begin creating a *PDF Form*.

Create a *PDF Form* Using Adobe Acrobat 3D's Advanced Editing Tool

Create a PDF Form using Adobe Acrobat 3D's Advanced Editing Feature (Tools → Advanced Editing)

An existing PDF file can be opened in Adobe Acrobat 3D and can then be manipulated using the Advanced Editing tool. Use the Forms tool under the Advanced Editing menu to begin creating a PDF Form (Tools → Advanced Editing → Forms).

Creating Fields on a *PDF Form* Using the Forms Toolbar
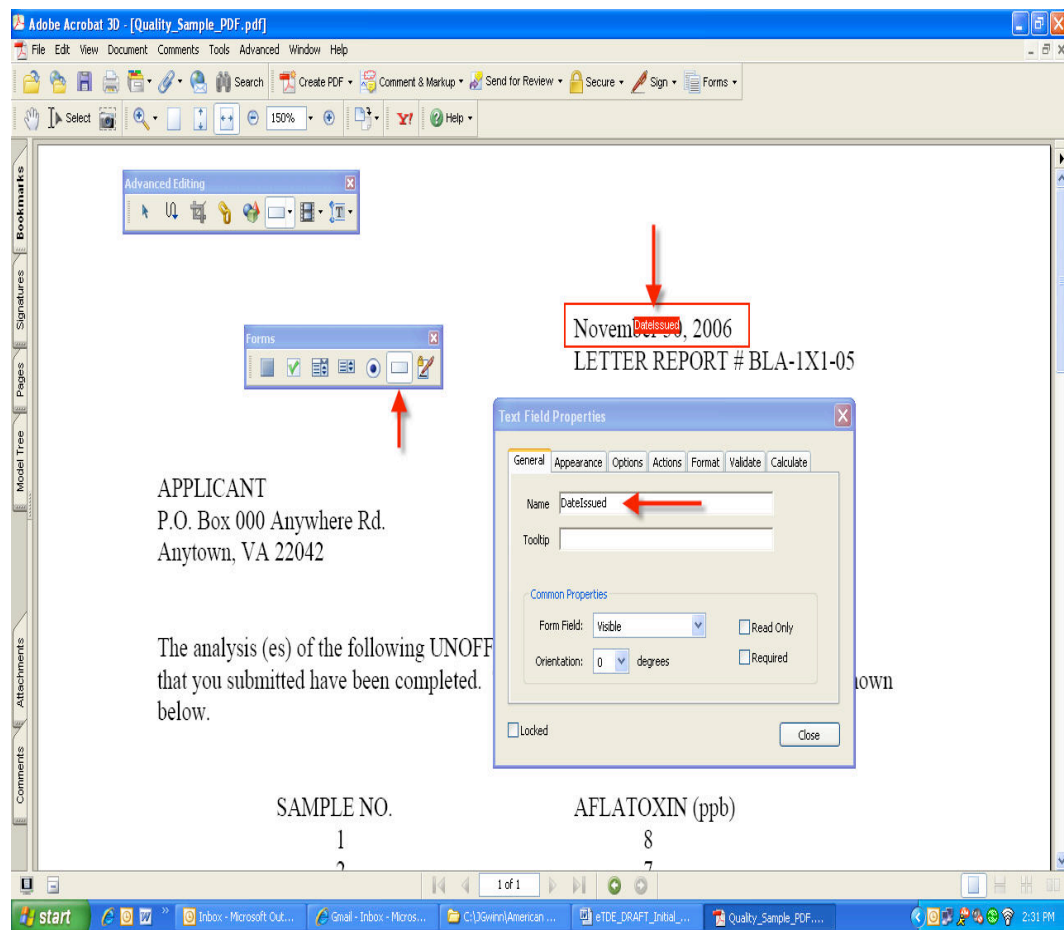
**Creating fields on a PDF Form using the Forms Toolbar (Tools →
Advanced Editing → Forms)**

Select the "Text" tool from the Forms Toolbar and drag/drop onto the PDF file to
create a *PDF Form* field. Once a field is placed on the PDF file, it becomes a *PDF
Form*. Use the Text Field Properties window to designate the field name to match
the industry-defined standard field names.

Save a PDF File as a *PDF Form*
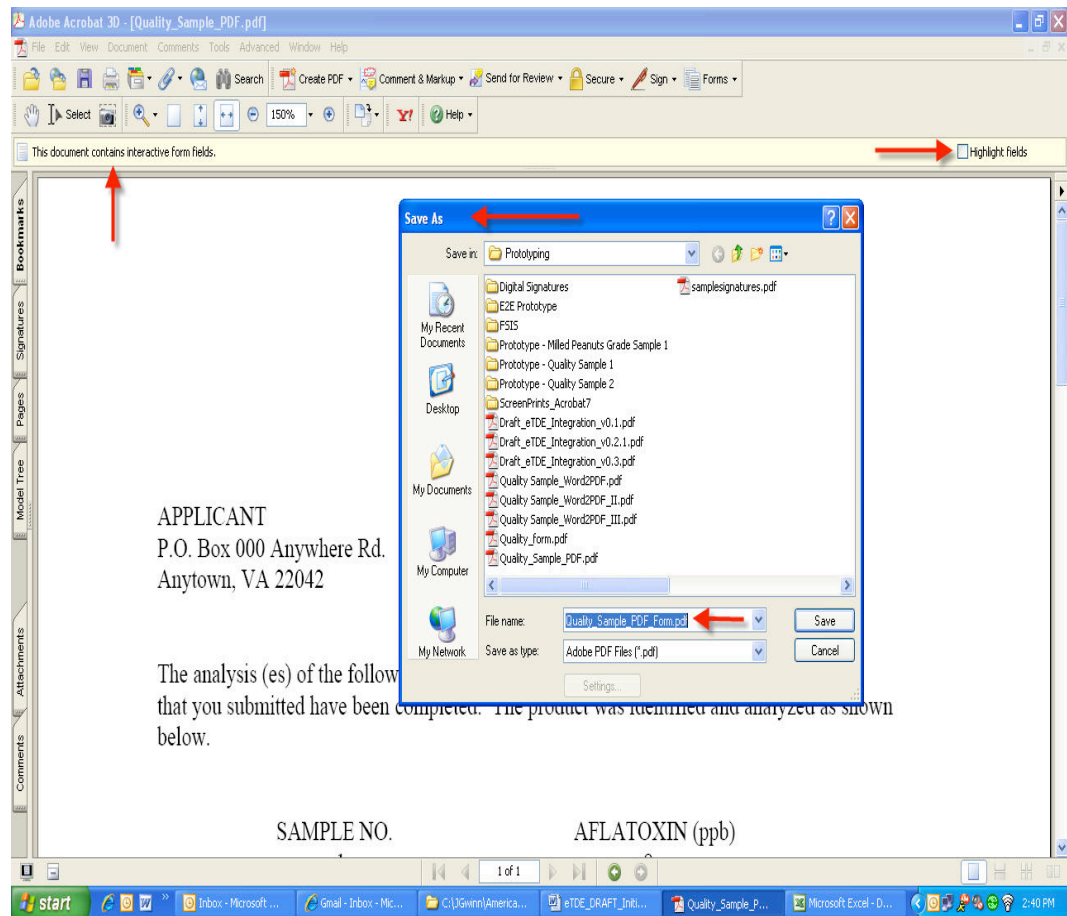
Save a PDF file as a *PDF Form*

Once fields have been created on a PDF file, it becomes a PDF Form. A message is displayed to indicate that the document contains interactive form fields. There is an option to highlight all fields on the PDF Form. This view does not highlight the fields.

Option to Highlight *PDF Form* Fields
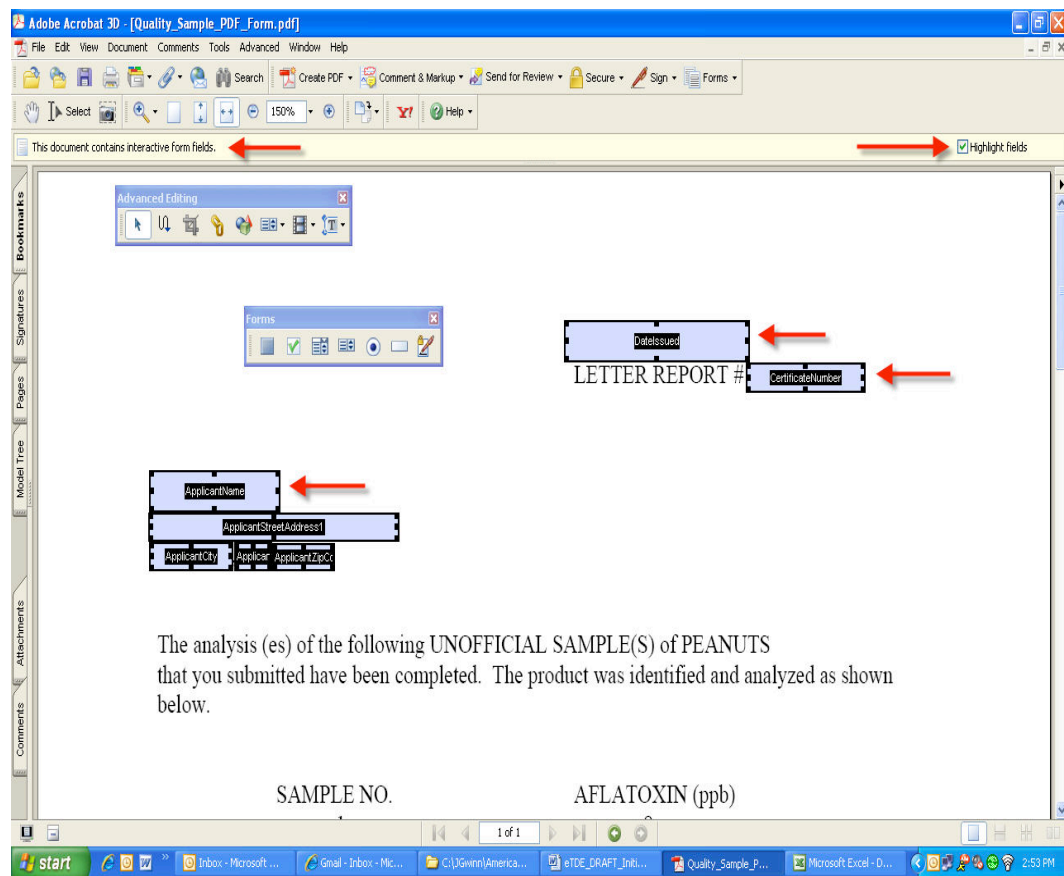
Option to highlight *PDF Form* fields

Fields on the PDF Form may be highlighted by selecting the "Highlight fields" checkbox in the upper right-hand corner of the page. Once selected, the fields on the PDF Form are highlighted.

Creating a PDF Form Using a Custom Solution

The eTDE Toolkit is the standard software that will be used to generate the documents and populate them with data. Document generation must be done using eTDE Toolkit.

Reading Data from a PDF Form and Writing to a Database

Pre-Requisites for Reading Data from a PDF Form and Writing to a Database

Pre-requisites for reading data from a *PDF Form* and Writing to a Database

Defining Variable and Database Connection String


```
Quality_PDF2DB.js - Notepad
File  Edit  Format  View  Help
// *********************************************************************
// activePDF Javascript creates a PDF form with properly tagged fields for eTDE database.
// ***USER VARS***
var strPath;
var jsNothing = null; // GetNothing();
var adAffectCurrent = 1; //
var adAffectGroup = 2; //
var adAffectAll = 3; //
var adAffectChapters = 4; //
var adOpenStatic = 3;
var adLockOptimistic = 3;
var adUseClient = 3;
var strRet = "";
var varInputFile = "Quality_form.pdf";
//
// ***SETUP***
objShell = new ActiveXObject("WScript.Shell");
objTK = new ActiveXObject("APToolkit.Object");
iRet = objTK.OpenInputFile(varInputFile);
//
//
// Database connection string:
// Data Source=DELL4400\\ETDE;UID=sa;PWD=;
varDSN = "PROVIDER=SQLOLEDB;Integrated Security=SSPI;";
varDSN += "Initial Catalog=ETRADE;";
//varDSN += "SERVER=DELL4400;"; // localhost
//varDSN += "DATABASE=eTDE;";
varDSN += "Data Source=DELL4400\\eTDE;";
//varDSN += "Extended Properties='User Instance=true';";
varDSN += "Persist Security Info=True";
//
objFileSystem = new ActiveXObject("Scripting.FileSystemObject");
strPath = objFileSystem.GetAbsolutePathName(".");
strPath += "\\" + varInputFile;
objShell.popup("Input file=" + strPath +"\rDSN=" + varDSN);
//
//
objConnection = new ActiveXObject("ADODB.Connection");
objRecordset = new ActiveXObject("ADODB.Recordset");
objConnection.Open(varDSN); // "DSN=" +
//objConnection.Open(varDSN, strUserName, strPassword);
//objRecordset.CursorLocation = adUseClient;
// DELL4400\ETDE\Databases\eTDE\Tables\dbo.tblDocMaster
objRecordset.Open("SELECT * FROM [eTDE].[dbo].[tblDocMaster]",
        objConnection, adOpenStatic, adLockOptimistic);
objShell.popup("Connected to database.", 1,
        "eTDE data import from PDF to database", 64);
//objTK.XMLGetFormFieldData("data.xml",0,1,"."); // XML data from PDF form.
//
        // All fields.
```

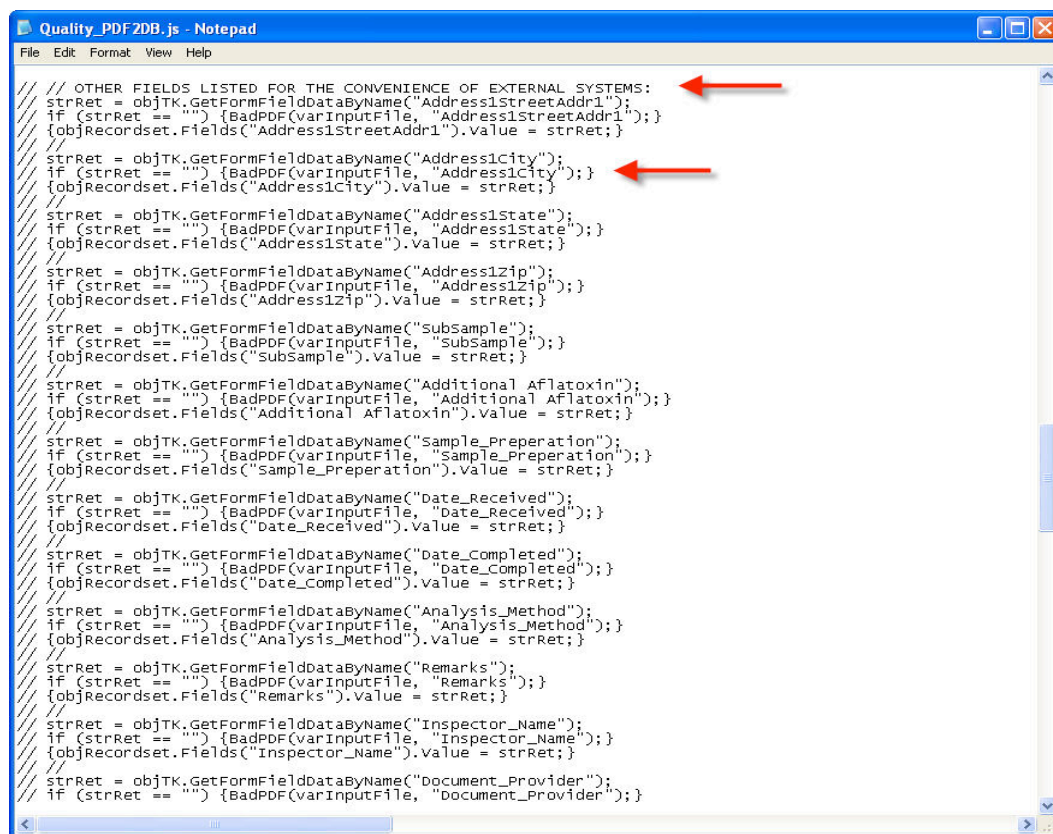**Defining variables and connecting to a database**

Mapping PDF Form Fields to Database Table Fields (eTDE Required Fields)


```
// All fields.
objRecordset.AddNew;
//
// MAP FORM FIELD NAMES TO DATABASE TABLE FIELD NAMES.        ◄━━
//objRecordset.RecordCount + 1
//
// NOTE:          appDocument_ID_Internal is an identity field in eTDE table.
//                        Thus, it is not written.
//
strRet = objTK.GetFormFieldDataByName("appProduct");
if (strRet == "") {BadPDF(varInputFile, "appProduct");}        ◄━━
{objRecordset.Fields("appProduct").Value = strRet;}
//
strRet = objTK.GetFormFieldDataByName("appDocument_Type");
if (strRet == "") {BadPDF(varInputFile, "appDocument_Type");}
{objRecordset.Fields("appDocument_Type").Value = strRet;}
//
strRet = objTK.GetFormFieldDataByName("appDocument_Provider");
if (strRet == "") {BadPDF(varInputFile, "appDocument_Provider");}
{objRecordset.Fields("appDocument_Provider").Value = strRet;}
//
strRet = objTK.GetFormFieldDataByName("appDocument_Owner");
if (strRet == "") {BadPDF(varInputFile, "appDocument_Owner");}
{objRecordset.Fields("appDocument_Owner").Value = strRet;}
//
strRet = objTK.GetFormFieldDataByName("appDocument_ID_ExternalSystem");
if (strRet == "") {BadPDF(varInputFile, "appDocument_ID_ExternalSystem");}
{objRecordset.Fields("appDocument_ID_ExternalSystem").Value = strRet;}
//
strRet = objTK.GetFormFieldDataByName("appCertificate_Number");
if (strRet == "") {BadPDF(varInputFile, "appCertificate_Number");}
{objRecordset.Fields("appCertificate_Number").Value = strRet;}
//
strRet = objTK.GetFormFieldDataByName("appETDE_Reference");
if (strRet == "") {BadPDF(varInputFile, "appETDE_Reference");}
{objRecordset.Fields("appETDE_Reference").Value = strRet;}
//
strRet = objTK.GetFormFieldDataByName("appETDE_Comment");
if (strRet == "") {BadPDF(varInputFile, "appETDE_Comment");}
{objRecordset.Fields("appETDE_Comment").Value = strRet;}
//
strRet = objTK.GetFormFieldDataByName("appDocument_Status");
if (strRet == "") {BadPDF(varInputFile, "appDocument_Status");}
{objRecordset.Fields("appDocument_Status").Value = strRet;}
//
// Not a required field.
strRet = objTK.GetFormFieldDataByName("appCertificate_Superseded");
//if (strRet == "") {BadPDF(varInputFile, "appCertificate_Superseded");}
{objRecordset.Fields("appCertificate_Superseded").Value = strRet;}
//
// Not a required field.
```

Mapping *PDF Form* fields to database table fields (eTDE required fields)

Mapping PDF Form Fields to Database Table Fields (All Standard Fields)

Mapping *PDF Form* fields to database table fields (all standard fields)

General Validation of Fields (from PDF Form to Database)


```
Quality_PDF2DB.js - Notepad
File  Edit  Format  View  Help
            objTK.CloseInputFile();
            objTK = null;
            //objRecordset.Close;
            //objConnection.Close;
            WScript.Quit(1);
} // function BadPDF()


// Validation utility functions.         <--
//
//regular expression should match number with commas or not
//1. (^-? <-- '-' is optional at the beginning
//2. [1-9] <-- first digit should be between 1~9; 090 shouldn't be allowed
//3. (\d{1,2}(\,\d{3})* | <-- with comma, at least one digit with max of three before repeating like ',ddd
//3. \d*) | <-- without comma, match any number of integer(shouldn't be though)
//4. ^0{1}$ <-- allow only one zero and no minus zero
//
function IsRegEx(varField) {
            // General purpose literals.
            var re = /(^-?[1-9](\d{1,2}(\,\d{3})*|\d*)|^0{1})$/;
            var reNumbers = /^-{0,1}\d*\.{0,1}\d+$/;
            var reNumCommas = /^-?(\d{1,3}|\d{1,3}(\,\d{3})*|\d*)$/g;        // Check a integer number with com
            var rePhoneNumber = /(\d\d\d) \d\d\d-\d\d\d\d/;
            //
            //var re = new RegExp(re.value); // ctor
            if (! re.test(varField)) {return false;} //
            return true;
} // function IsRegEx()


function fGetDate() {
            // Format:  2/3/2006 12:00:00 AM
            var strDate;
            var currentTime = new Date();
            var month = currentTime.getMonth(0) + 1;
            var day = currentTime.getDate();
            var year = currentTime.getFullYear();
            strDate = month + "/" + day + "/" + year;
            // currentTime.toUTCString()
            //
            var hours = currentTime.getHours();
            var minutes = currentTime.getMinutes();
            if (minutes < 10) {minutes = "0" + minutes;}
            strDate += " " + hours + ":" + minutes + " ";
            if(hours > 11) {strDate += ("PM");}
            else {strDate += ("AM");}
            //objShell.popup("Date: " + strDate,10,"eTDE Upload-Import Date",64);
            return strDate;
} // function fGetDate()

// eof()
```

**General validation of fields (from *PDF Form* to database)**

Populating PDF Forms with Accessibility Tags for Section 508 Compliance

In 1998, Congress amended the Rehabilitation Act to require Federal agencies to make their electronic and information technology accessible to people with disabilities. Inaccessible technology interferes with an individual's ability to obtain and use information quickly and easily. Section 508 was enacted to eliminate barriers in information technology, to make available new opportunities for people with disabilities, and to encourage development of technologies that will help achieve these goals. The law applies to all Federal agencies when they develop, procure, maintain, or use electronic and information technology. Under Section 508 (29 U.S.C. '794d), agencies must give disabled employees and members of the public access to information that is comparable to the access available to others.

PDF forms may be made 'accessible' using Adobe Acrobat Professional 6.0 or later. To create the accessibility tags, perform the following steps:

Add "Fillable" Form Fields and Descriptions

Adobe Acrobat 3D (Adobe Acrobat 7 Professional) has a Forms toolbar that provides numerous tools for creating "fillable" form fields, such as buttons, check boxes, list boxes, text boxes, etc. As a field is created, descriptions may be added. Type the description into the Tooltip box in the General tab of the field's Properties dialog box. Screen reading software, such as JAWS, will read this text aloud to the user.
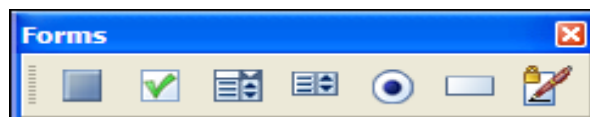
The Forms toolbar of Acrobat Professional
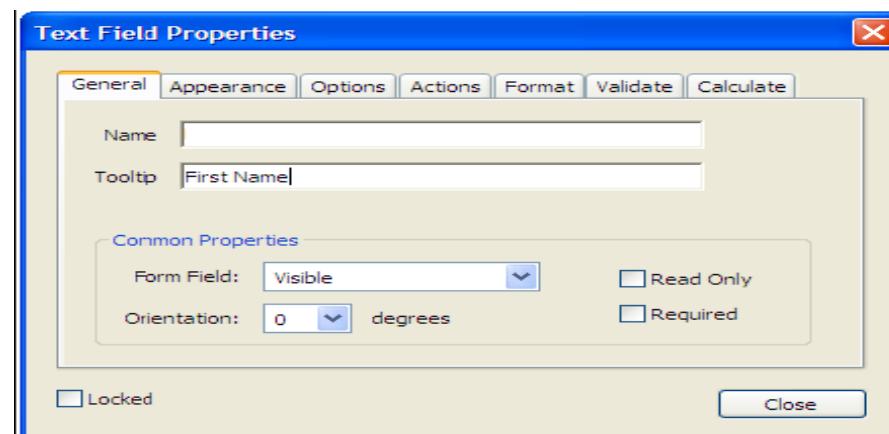
Adding a description as you create a form field—type the description into the Tooltip box for the field.

Set the Tab Order

Although Adobe Acrobat Professional offers manual control over the tab order, set the tab order to use the document's structure. This setting provides the greatest accessibility.

To set the tab order of form fields to use the document structure:

1 Open the Pages tab of the navigation pane.
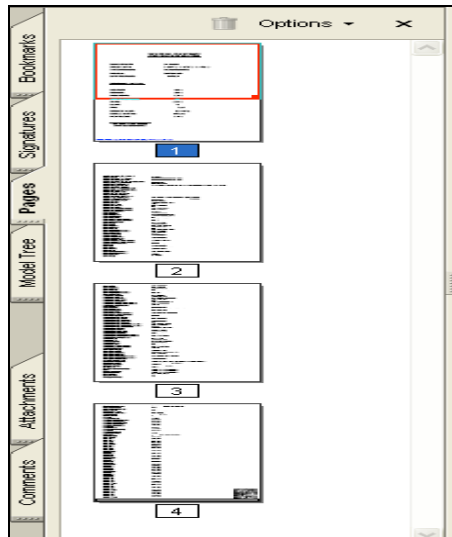
2 Select all the pages by pressing Ctrl+A (Windows) or Command+A (Mac OS).
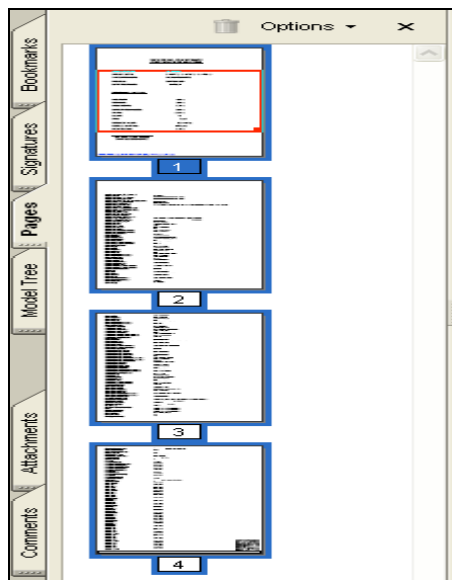
3 From the Pages tab, choose Options > Page Properties.
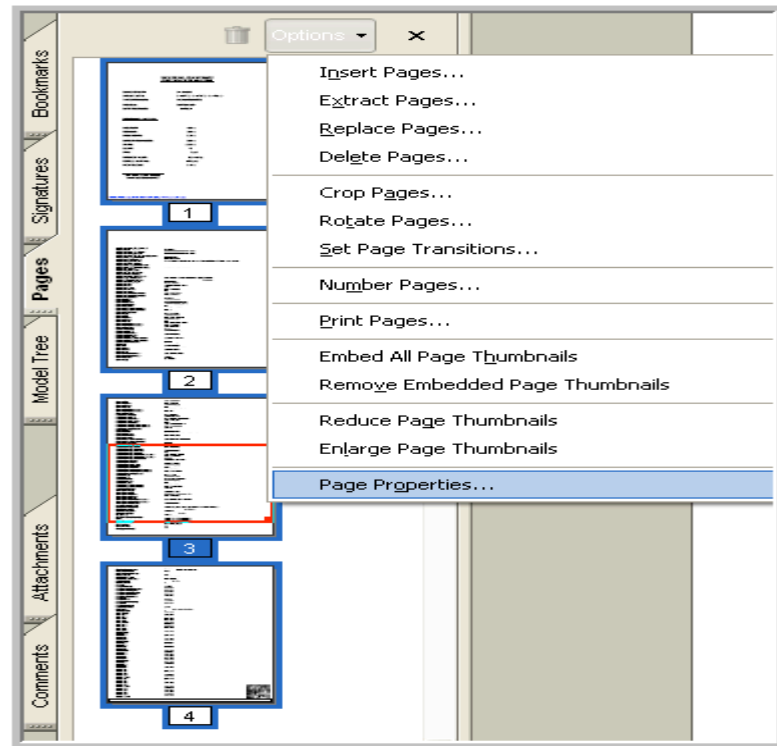
4 In the Page Properties dialog box, select the Tab Order tab, and then select Use Document Structure.
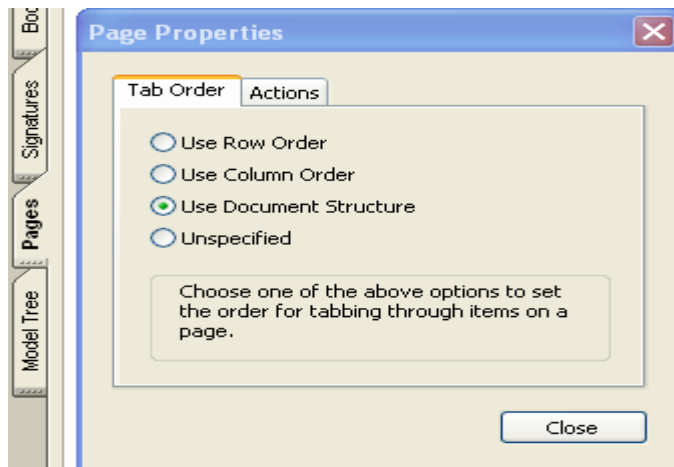
Create Accessibility Tags

1 Check for existing tags in an Adobe PDF document using the File > Document Properties command. At the bottom of the Document Properties dialog box, look for "Yes" or "No" next to the Tagged PDF entry.
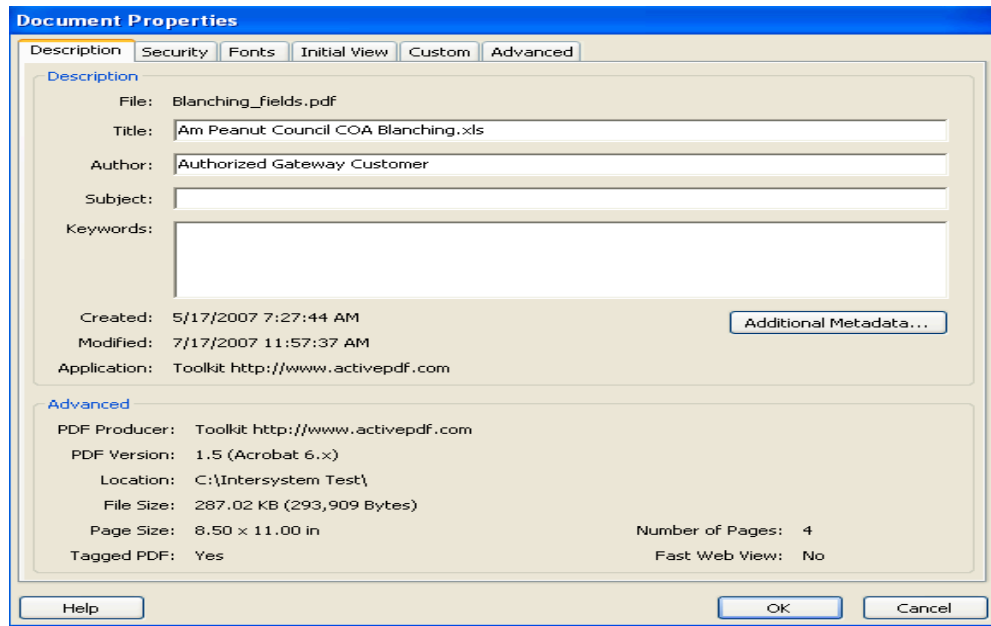
2 If the PDF form is already tagged, use the TouchUp Reading Order tool in Adobe Acrobat Professional to tag each form field added in step 1 of this workflow. This tool allows the user to fix any reading order problems of the text labels for the form fields. (For instance, merged lines of fields may need to be split into individual fields.)
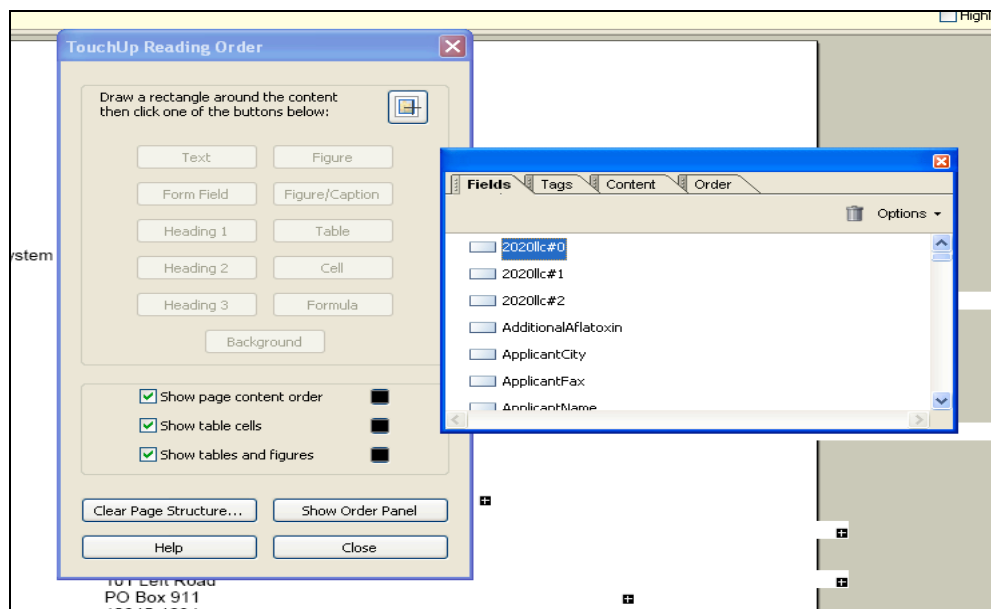
3 If the form is untagged, use Adobe PDF Forms Access to perform the following steps to add tags to the Adobe PDF document:

> **a)** Open the Adobe PDF document in Acrobat 7.0.
> **b)** Choose Advanced > Accessibility > Add Tags To Document.
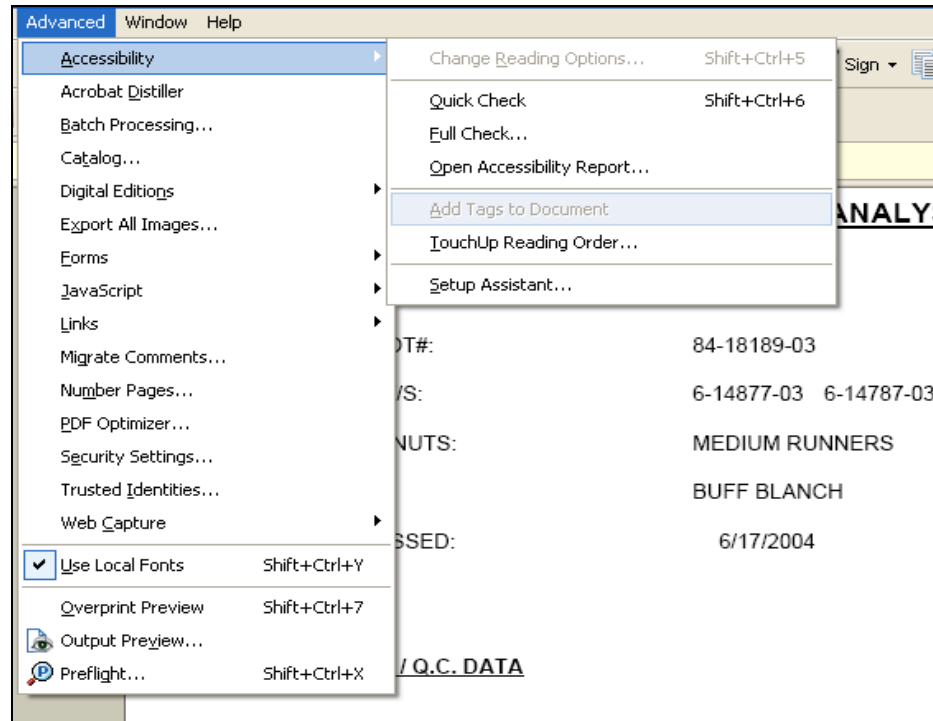
Acrobat analyzes each page to determine the page's various elements and roles, their proper reading order, and which tag to apply to each element. It then adds a tag tree to the document to represent these page elements and their reading order. In Acrobat 7.0 Professional, a report of the results also appears in the How To window after the process is complete, so that you can edit any tags that need repair.

Complete the Accessible Adobe PDF Document

To ensure the PDF Document is accessible, perform the following steps in Adobe Acrobat Professional:

1 Perform an Accessibility Full Check and verify that the fonts in the document are accessible.
2 Use the TouchUp Reading Order tool to fix reading order and other problems.
3 Add other features to optimize the PDF document for accessibility.

4 Edit the tag tree to repair complex problems.
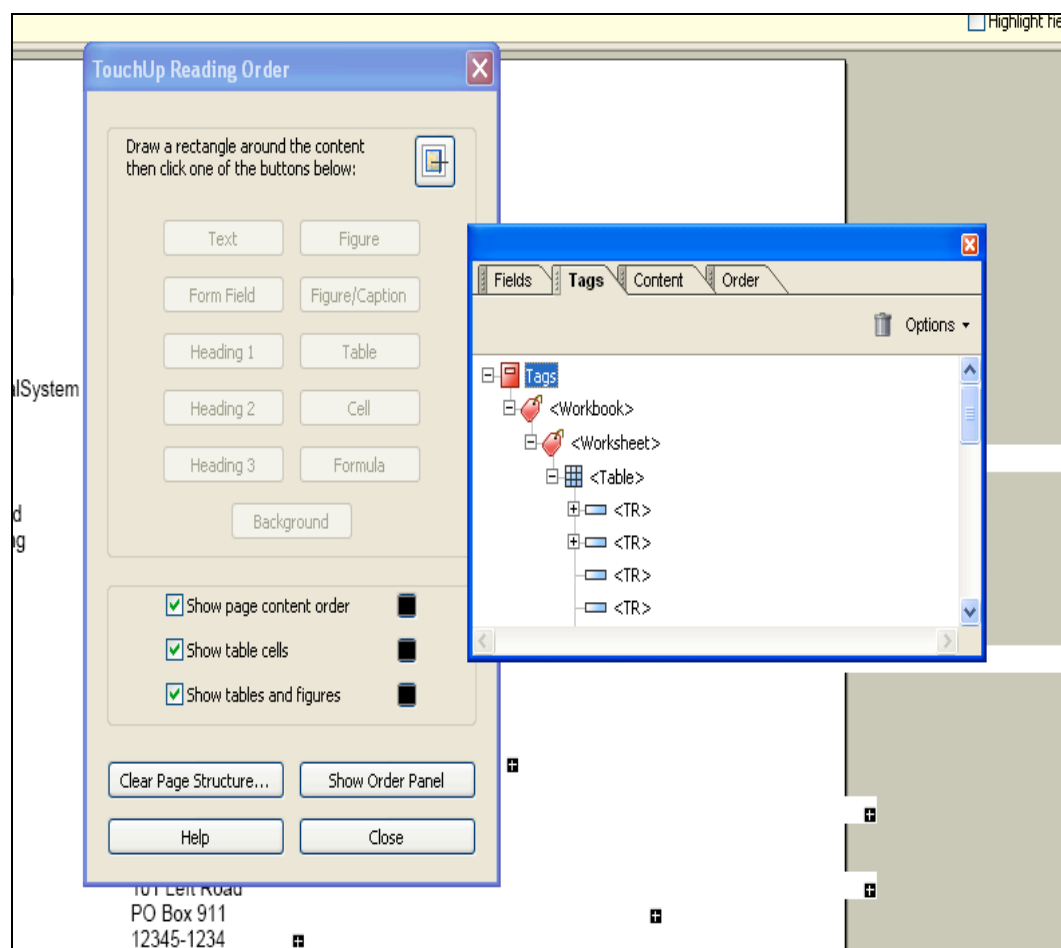
Accessing and Using the eTDE Website

This section will show the actual eTDE Graphical User Interface (GUI) and provides step-by-step instructions for how users will interact with each screen. The eTDE System can be accessed on the internet at http://www.etde.usda.gov .

Note: Users may have to disable pop ups in order to prevent "linkage not found" errors while navigating the eTDE system. If pop ups are allowed and a survey request appear, respond 'NO' to the request. If 'page not found' error occurs simply refresh page.

eTDE Welcome Page

Navigate to www.etde.usda.gov to see the eTDE Welcome Page

1. **Click to apply for a USDA eAuthentication Account**
   a. *If you do not have an eAuthentication Username and Password, or If you have not registered with eAuthentication System, user is directed to eAUTH home page*
   b. *See User Guide: Instructions_Access_eTDE_Production 4 June 2009*

2. Click to Login to eTDE

eTDE Login via USDA's eAuthentication Page

eTDE Users Login via the USDA's eAuthentication Page

1. Enter eAUTH Username and Password
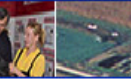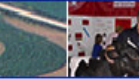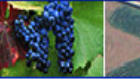
2. Click to login

   a. *If user logs into system for the first time, user is directed to the "eTDE Request Registration Page"*

   b. *If registered user with Associated Entity, user is directed to the "eTDE Home Page"*

   c. *If registered user without Associated Entity, user is directed to the "eTDE User Profile Page"*

eTDE Registration Request Page

Unregistered eTDE User Requests Registration for eTDE System
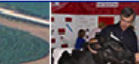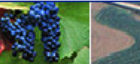
1. **Enter User demographic information**
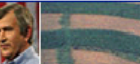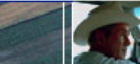   a. *User chooses not to Request Entity Registration*
2. **Click Request Registration Button**

        a. *User is directed to "User Profile Page" with demographic information populated*

3. **Click to Cancel**
        a. *User is directed to the "eAuth Login Page"*

4. **IMPORTANT: DO NOT CHECK REGISTER NEW ENTITY IF YOU DESIRE TO ASSOCIATE WITH AN EXISTING ENTITY. HIT REQUEST REGISTRATION AND YOU WILL BE TAKEN TO PROFILE PAGE WHERE YOU SELECT ENTITY TO ASSOCIATE WITH. THEN HIT REQUEST ASSOCIATION.**

5. **If user desires to Request New Entity Registration, Click** **to Register New Entity**

6. **If necessary, click Entity Information same as Work Information**
        a. *If Entity demographic information is same as Work demographic information*

7. **Enter Entity demographic Information**
        a. *If Entity demographic information is different than Work demographic information*

8. **Click to Request Registration**
        a. *Entity Registration Request sent to Systems Administrator for approval*
        b. *User is directed to "User Profile Page" with demographic information populated*

9. **Click to Cancel**
        a. *User is directed to the "eTDE Welcome Page""*

eTDE User Profile Page (Unassociated User)

eTDE User Manages User Profile (Unassociated User)

1. **If necessary, Edit Home and/or Work demographic information**
   a. *Click "Update Profile" button*
   b. *Verify that "Transaction Successful" message appears*
   c. *Profile Information now updated with changes*
2. **Click radio button for which user may associate with only one entity**
3. **Click "Request Association" button**
   a. *Entity Association Request sent to Entity Administrator*
   b. *User remains in User Profile Page*
4. **Click "Entity and External System Registration Request" button**
   a. *User is directed to the "Entity & External System Registration Page"*
   b. *Unassociated users will have the ability to request ability to request Entity Registration*
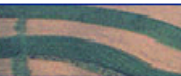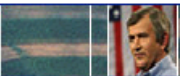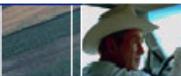5. **Click to Cancel**
   a. *User remains in User Profile page*

6. **If necessary, Edit Home and/or Work demographic information**
   a. *Click "Update Profile" button*
   b. *Verify that "Transaction Successful" message appears*
   c. *Profile Information now updated with changes*
7. **Click "Request Disassociation" button**
   a. *Verify that "Transaction Successful" message appears*
   b. *User no longer associated with Entity*
   c. *Entity Disassociation Notification sent to Entity Administrator*
   d. *User remains in User Profile Page*
8. **Click radio button for which user may associate with only one entity**
9. **Click "Request Association" button**
   a. *Verify that "Transaction Successful" message appears*
   b. *Entity Association Request sent to Entity Administrator*
   c. *User remains in User Profile Page*
10. **Click "Entity and External System Registration Request" button**
    a. *User is directed to the "Entity & External System Registration Page"*
    b. *Users that are currently associated with an Entity will not have the ability to request Entity Registration*
    c. *If User is not associated to an Entity, "Register New External System" checkbox will be "grayed" out.*
11. **Click "Administrator Registration Request" button**
    a. *If associated to an Entity, User is directed to the "Administrator Registration Page"*
    b. *If User is not associated to an Entity, "Administrator Registration Request button" will not be active*
12. **Click to Cancel**
    a. *If User associated to an Entity, User is directed Homepage*
    b. *If User not associated to an Entity, User remains in User Profile page*

eTDE User Profile Page (Associated User)

1. **If necessary, Edit Home and/or Work demographic information**
   a. *Click "Update Profile" button*
   c. *Profile Information now updated with changes*
2. **Click "Request Disassociation" button**
   a. *User no longer associated with Entity. but will remain active and have access to system as an unassociated user*
   b. *Entity Disassociation Notification sent to Entity Administrator*
   c. *User remains in User Profile Page*

3. **Click "Entity and External System Registration Request" button**
   a. *User is directed to the "Entity & External System Registration Page"*
   b. *Associated Users wilt have the ability to request External System Registrations*
.
4. **Click "Administrator Registration Request" button**
   a. *Associated Users will have the ability to Request Entity and/or System Administrator Registrations*
5. **Click to Cancel**
   a. *User is directed to Homepage*

eTDE Administrator Registration Request Page

eTDE User Requests Entity or System Administrator Registration

1. **Click "Request to be an Entity Administrator" radio button**
   a. *Associated Users will have the ability to request Entity Administrator Registrations*
   b. *If user has already submitted an Entity Administrator request and awaiting approval, the user will not be allowed to submit another request*
   c. *If user has been deactivated as an Entity Administrator for their associated Entity, the user will not be able to submit another request*
   d. *If user is currently and Entity Administrator for their associated Entity, the user will not be able to submit another request*

2. **Click "Request Registration" button**
   a. *Entity Administrator Registration Request sent to System Administrator for approval*
   b. *User remains in Administrator Registration Request page*

3. Click "**Request to be a System Administrator**" radio button
    a. *Associated Users will have the ability to request System Administrator Registrations*
    b. *If user has already submitted an System Administrator request and awaiting approval, the user will not be allowed to submit another request*
    c. *If user has been deactivated as an System Administrator, the user will not be able to submit another request*
    d. *If user is currently an System Administrator, , the user will not be able to submit another request*

4. Click "**Request Registration**" button
    a. *System Administrator Registration Request sent to System Administrator for approval*
    b. *User remains in Administrator Registration Request page*

5. Click to **Cancel**
    a. *User directed to User Profile Page*

eTDE Entity and External System Registration Request Page (Entity Registration)

eTDE User Submits Request for Entity and/or External System Registration

1. **Click** ☑ **"Request New Entity and become Entity Administrator" checkbox**
   a. *Complete Entity demographic information*

2. **If necessary, click Entity Information same as Work Information** ☑
   a. *If Entity demographic information is same as Work demographic information*

3. **Click "Request Registration" button**
   a. *Entity Registration Request sent to Systems Administrator for approval*
   b. *Note: System Administrator notifies AMS upon approval*
   c. *User is directed User Profile Page*

eTDE Entity and External System Registration Request Page (External System Registration)

4. **Click ☑ "Request New External System" checkbox**
   a. *Complete External System demographic information*
5. **Click "Request Registration" button**
   a. *External System Registration Request sent to Entity Administrator for approval*
   b. *Note: System Administrator notifies AMS upon approval*
   c. *User directed to User Profile Page*
6. **Click to Cancel**
   a. *User directed to User Profile Page*

Note: The name of the company and/or individual to which authority for transfering documents to or from the eTDE system should be given. Connections for transfers will only be allowed for individuals or companies that have registered their external system through this request.

eTDE Home Page

eTDE Home Page

1. **User's First and Last Name, Entity Name, Commodity Type are displayed**
2. **The Trade Document section lists all accessible Trade Documents uploaded in the past 7 days. The Trade Documents are displayed by Commodity Type, Document ID, Document Type, eTDE Reference, Certificate Number, Document Uploaded, Assigned ?**

3. **Click on Document Info Metadata link**
   a. *Document Information: Document Owner, Document Provider, Product, Document ID External System ,Document Type, Certificate Number , Document Status Certificate Number Superseding, Certificate Number Superseded, eTDE Reference, Date Issued, Date Uploaded Document Access: Username, User First Name, User Last Name , Entity Name (for which the User is associated), Date, Timestamp*
4. **Click on Manage User Access Button**
   a. *Trade Document Owners will only have the ability to Manage Access to Trade Documents*
   b. *Click on checkbox of Trade Document to be assigned shared ownership and/or access*
   c. *User is directed to Manage User Access page*
   d. *Trade Document selected from homepage appears in Manage Access for Trade Document section of the Manage User Access to Trade Document page, along with all other accessible documents associated with the eTDE Reference*
5. **Click on Supersede Button**
   a. *Trade Document Providers will only have the ability to Supersede Trade Documents*
   b. *Click on checkbox of Trade Document to be superseded*
   c. *User is directed to Supersede Documents page*
   d. *Trade Document selected from homepage appears in Documents to Superseded section of Supersede page*
6. **Click on Search Button**
   a. *User can search by Commodity Type, Document ID, Document Type, eTDE Reference, Certificate Number, Date Uploaded From and To (Note: the eTDE Reference Number is a concatenation of the state, House Number, Lot Number and Crop Year fields.*

eTDE Manage User Access to Trade Document Page

Manage User Access (Shared Ownership)

1. **The Manage Access to Trade Document sections lists the Trade Document selected from the Homepage along with all other accessible documents associated with the eTDE Reference. The Trade document(s) is displayed by Commodity Type, Document ID, Document Type, eTDE Reference, Certificate Number, Document Uploaded**
2. **Click on Select All button (Manage Access to Unassigned Documents section)**
   a. *Checkbox(s) is populated for all documents in Manage Access to Unassigned Documents section*
3. **Click on Deselect All Button (Manage Access to Unassigned Documents section)**
   a. *Checkbox(s) is blank for all documents in Manage Access to Unassigned Documents section*
4. **Click on Select All Button (Share Document Ownership section)**
   a. *Checkbox(s) is populated for all documents in Share Document Ownership section*
5. **Click on Deselect All Button (Share Document Ownership section)**
   a. *Checkbox(s) is blank for all documents in Shared Document Ownership section*
6. **Click on checkbox of desired Entity(s) to assign ownership privileges**
   a. *Checkbox(s) is populated for selected Entity(s) in Share Document Ownership section*
7. **Click on Submit Button (Share Document Ownership section)**
   a. *Entity will share ownership of document selected*
   b. *Document is moved to Manage Assigned Document section* with shared ownership assignments saved
      1. *User will have the ability to unassign current shared ownership assignments or assign further shared ownership assignments to other Entities*
   c. *User remains in Manage User Access to Trade Documents page*
8. **Click on Search Button (Search Functionality only applies to documents that have been assigned previously – Manage Assigned Document section)**
   a. *User can search by Commodity Type, Document ID, Document Type, Certificate Number, eTDE Reference, Date Uploaded From and To*
9. **Click Cancel button (Share Document Ownership section)**
   a. *User is directed to Homepage*

Manage User Access (Assigned Access)

1. **Click on Select All Button (Manage Access to Unassigned Documents section)**
   a. *Checkbox(s) is populated for all documents in Manage Unassigned Document section*
2. **Click on Deselect All Button (Manage Access to Unassigned Documents section)**
   a. *Checkbox(s) is blank for all documents in Manage Unassigned Document section*
3. **Click on Select All Button (Manage Document Access section)**
   a. *Checkbox(s) is populated for all documents in Manage Document Access section*
4. **Click on Deselect All Button (Manage Document Access section)**
   a. *Checkbox(s) is blank for all documents in Manage Document Access section*
5. **Click on checkbox of desired Entity(s) to assign access privileges**
   a. *Checkbox(s) is populated for selected Entity(s) in Management Document Access section*
6. **Click on Submit Button (Manage Document Access section)**
   a. *Entity will have access to document selected*
   b. *Document is moved to Manage Assigned Document section* with access assignments saved
      1. *User will have the ability to unassign current access assignments or assign further access assignments to other Entities*

   c. User remains in Manage User Access to Trade Documents page
7. **Click on Search Button Search Functionality only applies to documents that have been assigned previously – Manage Assigned Document section)**
   a. User can search by Commodity Type, Document ID, Document Type, Certificate Number, eTDE Reference, Date Uploaded From and To
8. **Click Cancel button (Manage Document Access section)**
   a. User is directed to Homepage

eTDE Supersede Document Page

Note on Superceding : If a superceding document is uploaded before the original speede document, it stays in a 'orphan superceding' folder in eTDE until the associated original is uploaded.

eTDE Supersede Page (Trade Document Providers)

1. **The Document to be Superseded section lists the Trade Document selected from the Homepage. The Trade document is displayed by Commodity Type, Document ID, Document Type, eTDE Reference, Certificate Number, Document Uploaded**
    a. *User can only supersede one document at a time*
2. **The Superseding Document sections lists all accessible Trade Documents uploaded in the past 7 days. The Trade documents are displayed by Commodity Type, Document ID, Document Type, eTDE Reference, Document Uploaded**
3. **Click Supersede Button**
    a. *User is directed to Supersede Confirmation page*
4. **Click on Search Button**
    a. *User can search by Commodity Type, Document ID, Document Type, Certificate Number, eTDE Reference, Date Uploaded From and To*
5. **Click Cancel button**
    a. *User is directed to Homepage*

eTDE Supersede Confirmation Page

eTDE Supersede Confirmation Page

1. **The Document to be Superseded section lists the Trade Document selected from the Homepage. The Trade document is displayed by Commodity Type, Document ID, Document Type, eTDE Reference, Certificate Number, Document Owner, Document Uploaded**
2. **The Document to be Superseded section lists the Trade Document selected from the Superseding Document section from the Superseding Document page. The Trade document is displayed by Commodity Type, Document ID, Document Type, eTDE Reference, Document Owner, Document Uploaded**
3. **Click on Confirm to Supersede Document Button**
   a. *Document is Superseded with Superseding document*
   b. *User remains in Supersede Confirmation page*
4. **Click Cancel button**
   a. *User is directed to Supersede Page*

eTDE Reports Page

eTDE Reports Page

1. **Click on eTDE User Report Link -**
   a. The eTDE Users Report displays a list of Trade Document Users with access and entity Association within the eTDE system. The System Administrator has the capability to filter by Last Name and First Name.
      i. *Primary User: System Administrator*
      ii. *New Window opens with report details*
2. **Click on eTDE Entity User Report Link**
   a. The eTDE Entity Users report will allow the eTDE Entity Administrator to view a report on all Users associated with their Entity. The Entity Administrator will have the ability to filter by Associated Users' Last Name and First Name.
      i. *Primary User: Entity Administrator*
      ii. *New Window opens with report details*
3. **Click on Non-Affiliated eTDE Report Link**
   a. The Non-Affiliated eTDE Users report will allow the eTDE System Administrator to view information on all users who have not been associated with an entity, including their expiration date should they not Associate with an Entity. The System Administrator has the capability to filter by Last Name, First Name, and Activation Expiration Date.
      i. *Primary User: System Administrator*
      ii. *New Window opens with report details*

4. **Click on eTDE Entities with Access Report Link**
   a. The eTDE Entities with Access Report allows the Trade Document Owners to view information on all entities that have access to the Trade Document Owner's data and which documents those entities have access to. The Owner will have the ability to filter Date Uploaded From and To.
      i. *Primary User: Entity Administrator, Trade Document Owner*
      ii. *New Window opens with report details*
5. **Click on Entities with no Access Report Link**
   a. The eTDE Entities With No Access report allows the eTDE System Administrator to view information on all the entities that have not been given access to any entity data. The System Administrator has the capability to filter on Entity Name and Entity Activated Date.
      i. *Primary User: System Administrator*
      ii. *New Window opens with report details*
6. **Click on Access to Trade Document Owner Report Link**
   a. The Access to Trade Document Owners Report allows the Trade Document User to view information on who has given access permissions to the Trade Documents. The user will have the ability to filter by Owner Name, Date Uploaded From and To.
      i. *Primary User: All users, excluding System Administrator*
      ii. *New Window opens with report details*

eTDE Document Information Page

eTRADE DOCUMENT EXCHANGE (eTDE) SYSTEM

Document Information:

Document Owner:	BirdsongPeanuts
Document Provider:	Blanchers
Product:	Peanut
Document ID External System:	Bla1
Document Type:	Blanching
Certificate Number:	Bla4
Document Status:	P
Certificate Number Superseding:	
Certificate Number Superseded:	
eTDE Reference :	VAH1Lot101
Date Issued :	5/27/2005 10:11:00 AM
Date Uploaded:	9/8/2008 12:57:32 PM

Document Access:

UserName	First name	Last Name	Entity Name	Visited Date
TestEntAdmin03 TestEntAdm	TestEntAdmin03	TestEntAdmin03	BirdsongPeanuts	09/08/2008 12:27
TestEntAdmin03 TestEntAdm	TestEntAdmin03	TestEntAdmin03	BirdsongPeanuts	09/08/2008 03:15
TestEntAdmin03 TestEntAdm	TestEntAdmin03	TestEntAdmin03	BirdsongPeanuts	09/08/2008 03:15

Document Information Page (Display MetaData)

1. **Click on Document Info Metadata link of Trade Document located on Homepage**
    a. *Document Information: Document Owner, Document Provider, Product, Document ID External System ,Document Type, Certificate Number , Document Status ,Certificate Number Superseding, Certificate Number Superseded, eTDE Reference, Date Issued, Date Uploaded*
    b. *Document Access: Username, User First Name, User Last Name , Entity Name (for which the User is associated), Date, Timestamp*

APPENDIX A: Glossary of Terms and Acronyms

Term / Acronym	Definition or Description
PDF	Portable Document Format – An open file format used to represent two-dimensional documents in a device independent and resolution independent fixed-layout document format. Each PDF file encapsulates a complete description of a 2D document (and, with the advent of Acrobat 3D, embedded 3D documents) that includes the text, fonts, images, and 2D vector graphics that compose the document.[1]
eTDE	eTrade Document Exchange is a content management system that was created to support the domestic and international trade of US agricultural products.
eTDE Toolkit	The "eTDE toolkit" is designed and programmed by the Agricultural Marketing Service (AMS), USDA, to provide a standard approach for generating and exporting documents into the Electronic Trade Document Exchange (eTDE). The toolkit consists of guidelines, a programming model, a full set of programming code, and artifacts. The programming code extracts data from the provider's data store and generates the PDF file for export to eTDE. The files are automatically uploaded to eTDE using the recommended ftp software. The recommended procedure in the toolkit results in certificates that accommodate variation in document types. Implementation of the system is designed to be nonintrusive to the external entity's existing IT operations and workflow.
PDF Form	A PDF file that has been altered to include form fields that are used to store data.
Adobe Acrobat Professional	Software that enables business professionals to reliably create, combine, and control Adobe PDF documents for easy, more secure distribution, collaboration, and data collection.[2]
Adobe Acrobat Reader	Software or viewing PDF files, used in many full-text electronic journals. The reader program is free, and if you do not have it on your machine when it is needed to access an article, instructions for downloading it will usually appear on your screen.[3]
JavaScript	JavaScript is a script language - a system of programming codes,

---

[1] Wikipedia, http://en.wikipedia.org/wiki/Portable_Document_Format

[2] Adobe Systems, http://www.adobe.com/products/acrobat/

[3] Google, Define, http://www.google.com/search?hl=en&defl=en&q=define:ADOBE+ACROBAT+READER&sa=X&oi=glossary_definition&ct=title

Term / Acronym	Definition or Description
	created by Netscape, that can be embedded into the HTML of a web page to add functionality. JavaScript should not be confused with the Java programming language. In general, script languages such as JavaScript are easier and faster to code than more structured languages such as Java and C++.[4]
Section 508 Compliance	In 1998, Congress amended the Rehabilitation Act to require Federal agencies to make their electronic and information technology accessible to people with disabilities. Inaccessible technology interferes with an individual's ability to obtain and use information quickly and easily. Section 508 was enacted to eliminate barriers in information technology, to make available new opportunities for people with disabilities, and to encourage development of technologies that will help achieve these goals. The law applies to all Federal agencies when they develop, procure, maintain, or use electronic and information technology. Under Section 508 (29 U.S.C. ' 794d), agencies must give disabled employees and members of the public access to information that is comparable to the access available to others.[5]
Content Management System (CMS)	A content management system (CMS) is a computer software system used to assist its users in the process of content management. CMS facilitates the organization, control, and publication of a large body of documents and other content, such as images and multimedia resources. A CMS often facilitates the collaborative creation of documents. A web content management system is a content management system with additional features to ease the tasks required to publish web content to web sites. Web content management systems are often used for storing, controlling, versioning, and publishing industry-specific documentation.[6]

---

[4] Google, Define,
http://www.google.com/search?hl=en&defl=en&q=define:JavaScript&sa=X&oi=glossary_definition&ct=title
[5] Section508.gov, http://www.section508.gov/index.cfm?FuseAction=Content&ID=3
[6] Wikipedia, http://en.wikipedia.org/wiki/Content_management_system